Electronic Research Administration
A program of the National Institutes of Health

National Institutes of Health
Office of Extramural Research

Account Management Module (AMM) User Guide for State Department Users

August 4, 2023

NOTE: This user guide is an identical PDF version of the online help.

Contact Us

Additional Help Needed? Please contact the eRA Service Desk (https://www.era.nih.gov/need-help).

Toll-free: 1-866-504-9552; **Phone:** 301-402-7469

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

Feedback on the user guide? Please email the eRA Communications Office (era-communications@mail.nih.gov).

Disclaimer STATEMENT

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

Latest Updates

Updates and new features in AMM:

July 27, 2023

New Look and Feel for Online Help and User Guide

- The online help and user guide have been updated to the new look and feel, consistent with the new look and feel of eRA Modules. There are no changes to the function of the help topics.

New Name for AMM

- Account Management has been rebranded as Account Management Module (AMM) to distinguish it from the HHS Access Management System (AMS), and the online help has been updated to reflect this change.

December 6, 2022

Updated Search Results and Manage Account pages to reflect Two-Factor Authentication fields for State Department users.

Welcome to Account Management Module (AMM) Online Help

This help system provides online information about the functionality of the Account Management Module (AMM) module. This topic illustrates the use of this online help system.

Help Icon in Module Leads to Online Help

Access online help by clicking the Help icon, which is a blue circle containing a white question mark, from any screen within the Account Management Module (AMM) module.

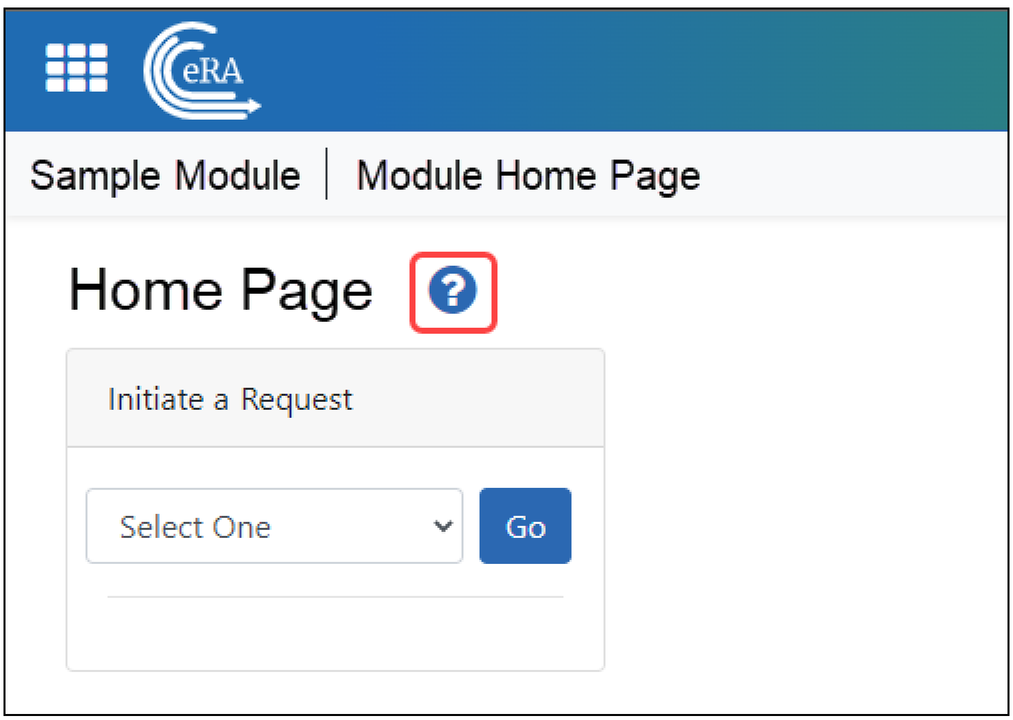
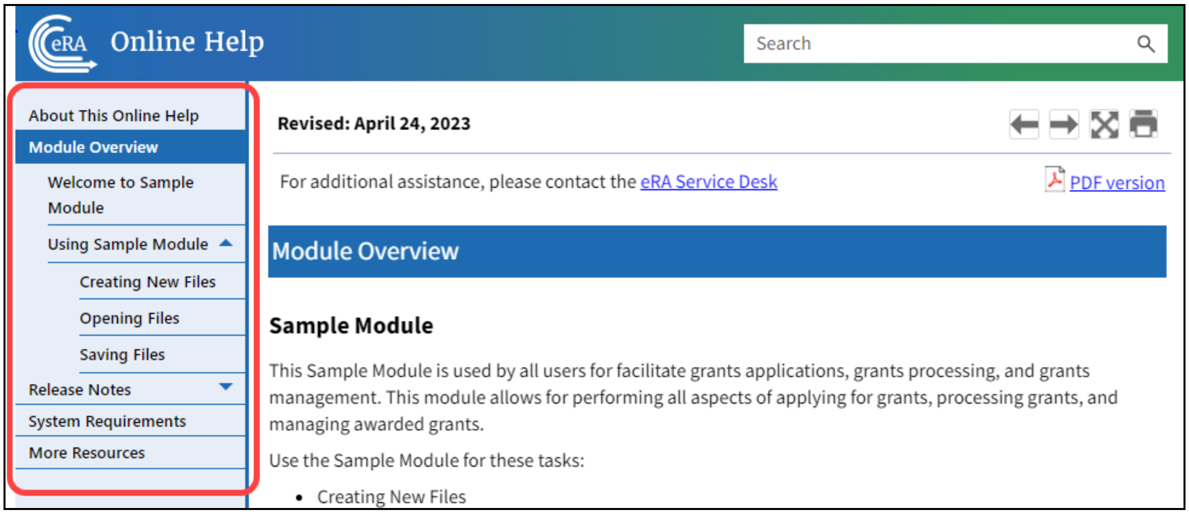
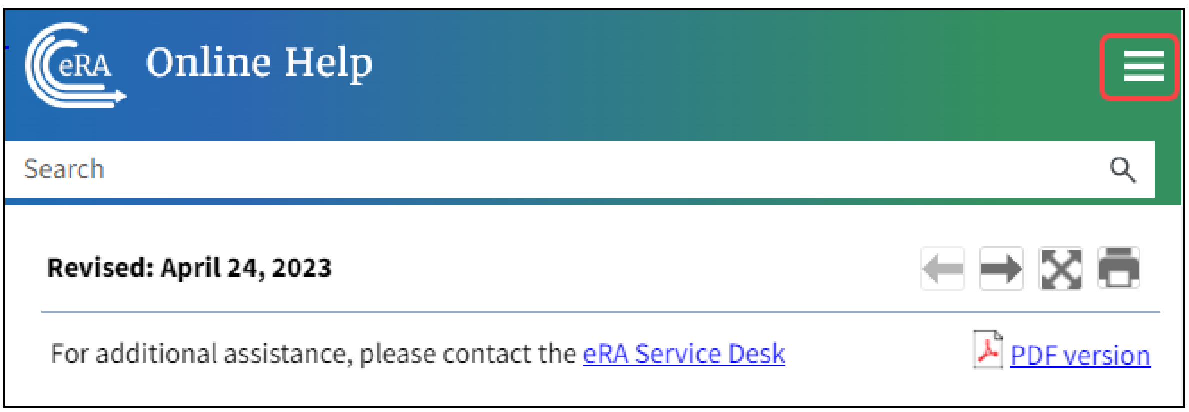


Table of Contents Pane

Use the table of contents pane at the left of a help system to navigate through topics. If a topic name has a down arrow next to it, click it to reveal subheadings.

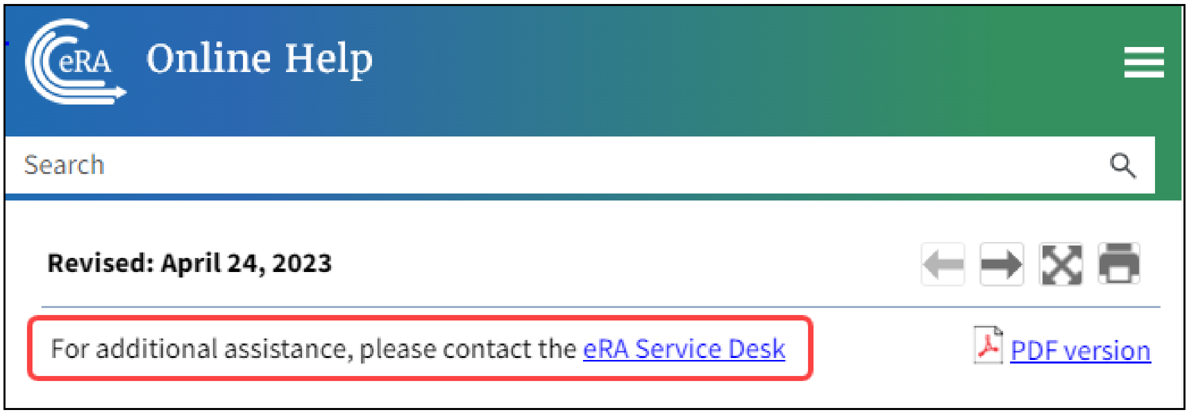


When the browser window is narrow, the table of contents pane is hidden. To view a hidden table of contents, click the three-horizontal-line icon at right top to toggle the table of contents between onscreen and hidden.



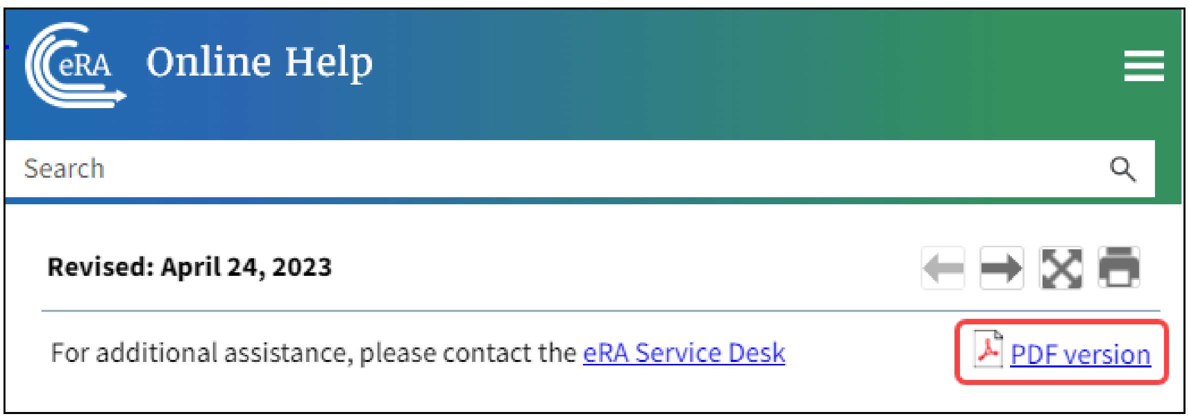
Contacting the eRA Service Desk

Online help pages contain a link to the eRA Service Desk at top. Contact the service desk for help with error messages, system questions, and help solving problems in eRA modules. The link is located above the page title on all online help pages.



Viewing all Online Help in a PDF Version

All online help is available in PDF format. The PDF contains identical information as the online help. The PDF is linked at the top right of every online help page with a link named PDF Version.



Showing Hidden Text or Images

You might encounter dropdown text or toggled images in online help. Sometimes, to save screen space and let you focus on the information important to you, online help hides text or images behind linked text.

For instance, click the following heading to see the hidden dropdown text showing steps of a procedure:

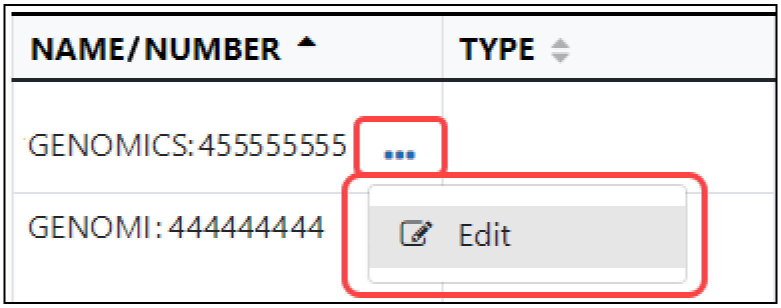
Creating a New File

1. Click the New button.

2. Enter a name for the file.

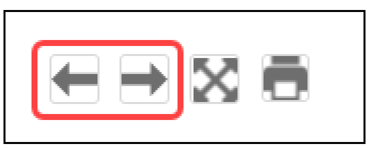
3. Click the Save button.

Images can also be toggled. In the example below, click the words "Access the Edit action by clicking the three-dot ellipis icon" to see the hidden image.

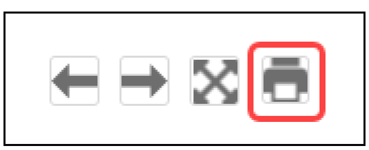


Tools for Navigating Topics, Showing Hidden Material, and Print-ing

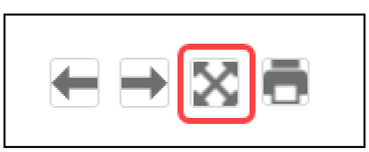
Click the left and right arrow icons at top right to go to the previous or next topic in the table of contents:



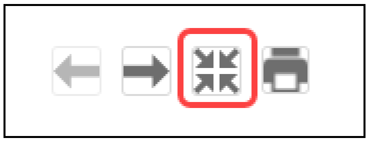
Click the print icon, below, to print:



Click the expand icon, below, to expand all material that is hidden in a topic.

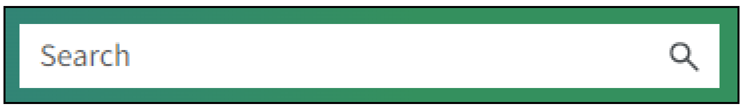


Click the collapse icon, below, to collapse all material. The collapse icon appears only after clicking the expand icon.



Search Field

Type text into the search field to find all topics that contain matching text. Then either press the Enter key or click the magnifying glass icon to search.



If you type multiple words in the search field, the search assumes an 'AND' between each word. For example, if you search for ***system requirements***, the search does this: Find all topics that contain both ***system* AND *requirements***, not necessarily adjacent to each other in text. It counts variations of words as a match; for example; ***require*** or ***required*** are deemed to be matches for ***requirements***.

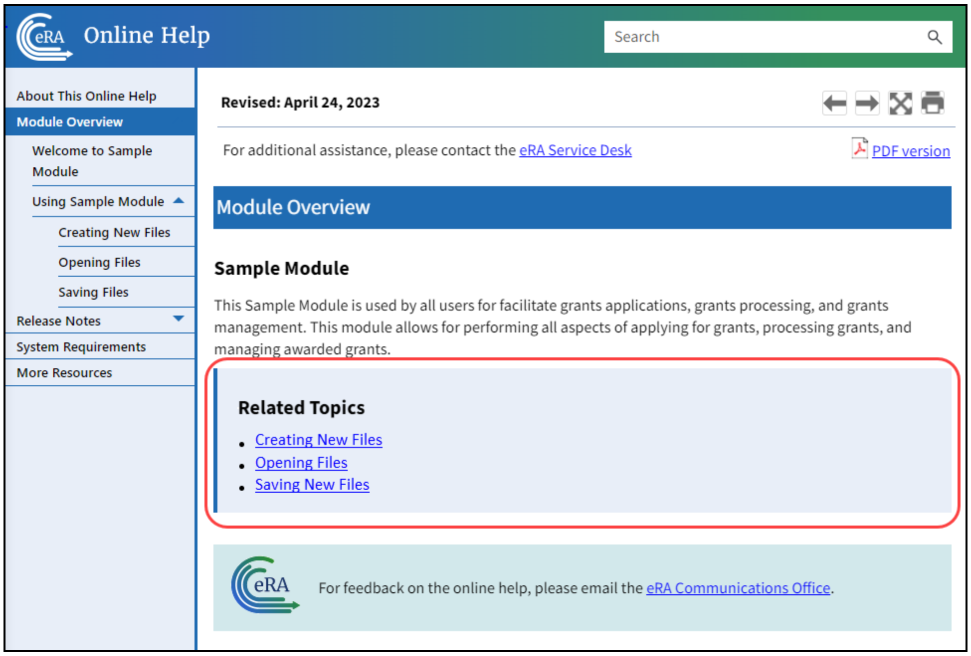
If you want only topics that contain an exact phrase, enclose it in double quotation marks like this:

"system requirements"

The search field searches ONLY the current help system for the Account Management Module (AMM) module. To search all help systems, go to the eRA website and use the search field at the top of the page.

Finding Related Topics

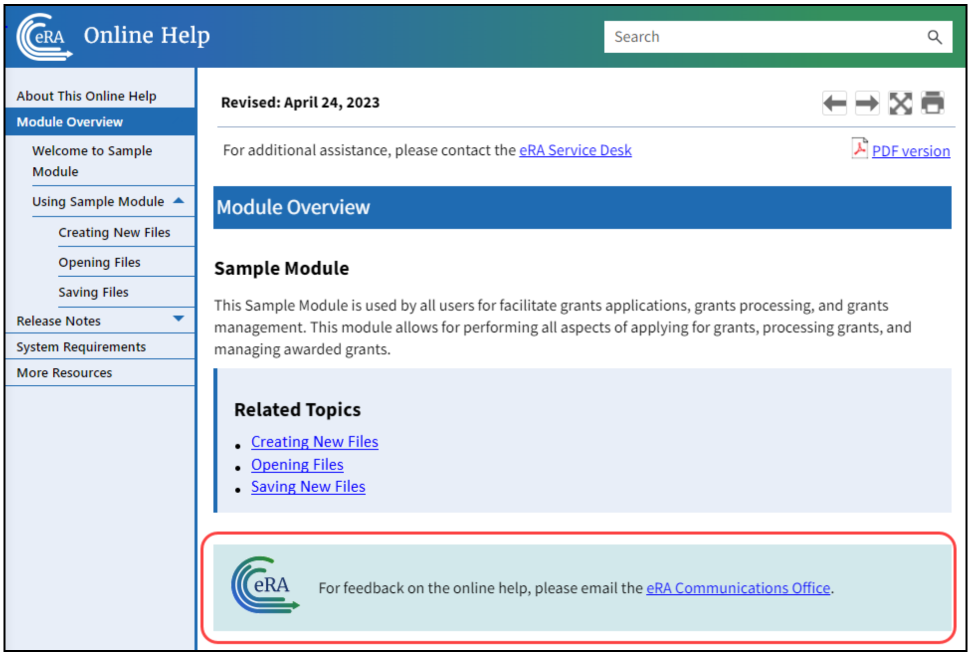
Most topics contain a Related Topics section, which show links to a list of topics that are related to the one you are viewing.



Providing Feedback on the Online Help or PDF

All topics contain a green feedback footer with an email link to the eRA Communications Office, which creates and updates online help and PDFs. The eRA Communication Office does not provide technical support but is happy to accept feedback on how we might make the online help better meet your needs.

For tech support, contact the eRA Service Desk instead of the Communication Office.


Online Help
Search
About This Online Help
Module Overview
Welcome to Sample Module
Using Sample Module
Creating New Files
Opening Files
Saving Files
Release Notes
System Requirements
More Resources
Revised: April 24, 2023
For additional assistance, please contact the eRA Service Desk
PDF version
Module Overview
Sample Module
This Sample Module is used by all users for facilitate grants applications, grants processing, and grants management. This module allows for performing all aspects of applying for grants, processing grants, and managing awarded grants.
Related Topics
Creating New Files
Opening Files
Saving New Files
For feedback on the online help, please email the eRA Communications Office.

Overview

The Account Management Module (AMM) facilitates user and system account administration based on assigned user roles. The system provides the ability to search existing accounts. When a search is performed, all records that meet the search criteria are returned on the *Search Accounts* screen.

State Department staff have the ability to search, create, maintain, and view user accounts only.

Authorized users can:

- Create new user accounts.
  - The Username and password must comply with Standard eRA policy guidelines.
  - All temporary passwords are system generated.
- Manage existing user accounts.
- Manage role(s) on user accounts.
- Affiliate an account with an Organization, Agency, or Institute/Center (IC).
- Reset passwords on existing accounts.
  - **NOTE**: All passwords are system generated.

User Roles

The following users have the ability to search for, manage and create accounts, and to add or remove roles for user and system accounts:

State Department

- FACTS State Department Clearance Manager (FACTS SDC MGR role)

Account Statuses

AMM user accounts can have the following statuses:

- Active — A valid account in good standing.
- *Deactivated* — Account has been disabled by an administrator

- *Locked due to inactivity* — Locked by the system due to inactivity (no user activity for 120 days).
- *Pending Affiliation* — Account has not yet been associated to an organization
- *Profile Only* — A profile that is not associated to a user account.

Accessing AMM

State Department Staff

The only **User Type** available is *State*.

1. State Department staff can access AMM at this address: https://public.era.nih.gov/ams.
2. The *Commons Login* screen opens.
3. Enter your **User Name** and **Password**.
4. Click the **Login** button.

Upon successful login, the*Search Accounts* screen opens.

For instructions on performing a search, see Search Account.

NOTE: If you see an eRA/IMPACII Systems Rules of Behavior page, you must read it over and agree to terms before you are allowed to access IMPACII modules. See eRA/IMPAC II Rules of Behavior Agreement for more information.

Search for State Department User Accounts

The *Search Accounts* screen for State Department users provides the ability to search for existing user accounts.

NOTE: For State Department users the **Search within my organization** check box is automatically checked and the only **User Type** is *State*.

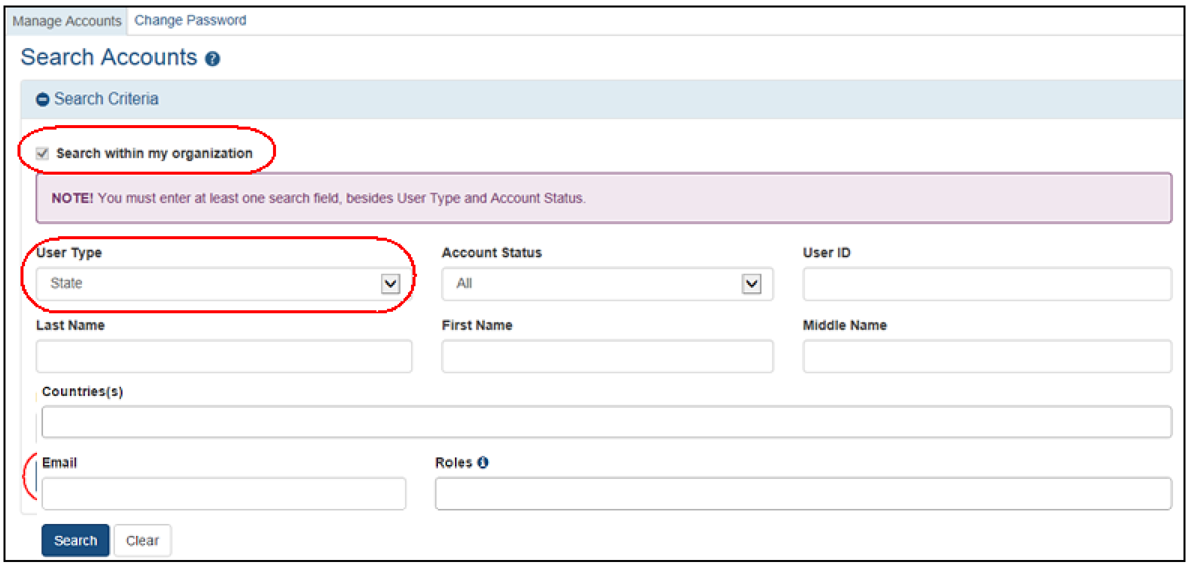


Figure 1: Search Accounts Screen for State Department Users

NOTE: You must enter at least one search field, besides the **User Type** and **Account Status**.
Wild card characters such as the percent sign (%) can be used to search for a string of characters.

1. Enter the appropriate search criteria in at least one of the other search fields.
2. Perform one of the following options:
    a. Click the **Search** button to execute the search.
        i. Please refer to the State Department User Account Search Results topic.
    b. Click the **Clear** button to clear the search criteria.

State Department User Account Search Results

When the **Search** button is clicked, the system displays appropriate user accounts in the **Search Results** located below the *Search Criteria* section on the *Search Accounts* screen. The search results are sorted alphabetically first by last name, first name in the **Name** field and then by **Account Status**.

NOTE: The **Create New Account** button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Email**
- **Account Status** -
  - *Active* - The **Manage** button displays in the **Action** column.
  - *Pending Affiliation* - The **Manage** button displays in the **Action** column.
- **Roles & Affiliations** - FACTS SDC MGR ROLE only
- **Login via Login.gov** - indicates whether two-factor authentication via Login.gov is required or optional for a user.
- **Action** - The **Action** buttons are **Create** and **Manage**.

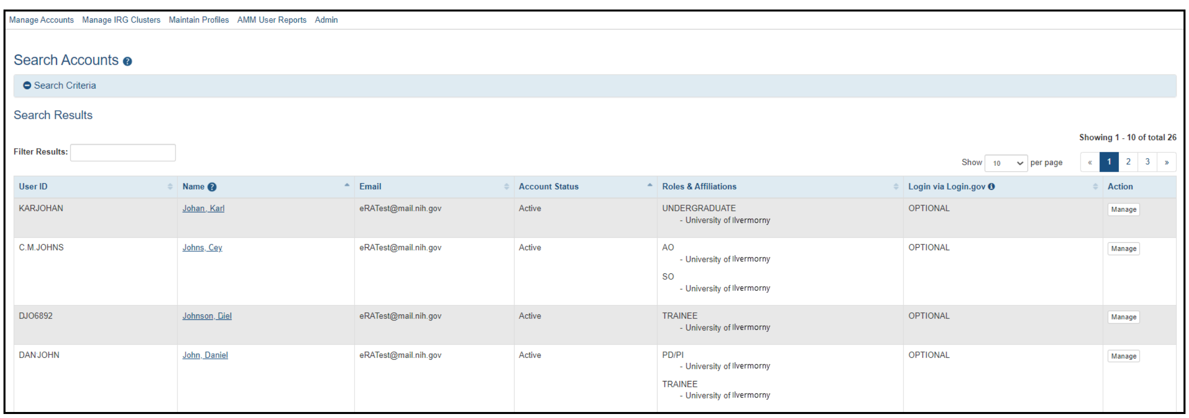


Figure 2: Search Accounts Screen Displaying State Department Search Results

Working with the Search Results

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter a value in the **Filter:** text box and hit the **<Enter>** key.
    a. Example: to view all users with the word *Ann* in the **Name** or **User ID**, type *ANN* in the **Filter:** text box.

NOTE: The default number of records per page is 10.

3. To change the number of records per page, select the appropriate number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
    a. Click the appropriate **Page Number** button.
    b. Click the **right double arrows** button to go to the end of the list.
    c. Click the **left double arrows** button to go to the beginning of the list.
5. To sort the search results, click the click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).
6. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a Principal Investigator's (PI) multiple affiliations.
7. Actions Options
8. To return to the top of the screen, click the **Back to top** hyperlink.

Action Options

- **Create Account**
    - To create an account, find the correct User ID and click the Create button.

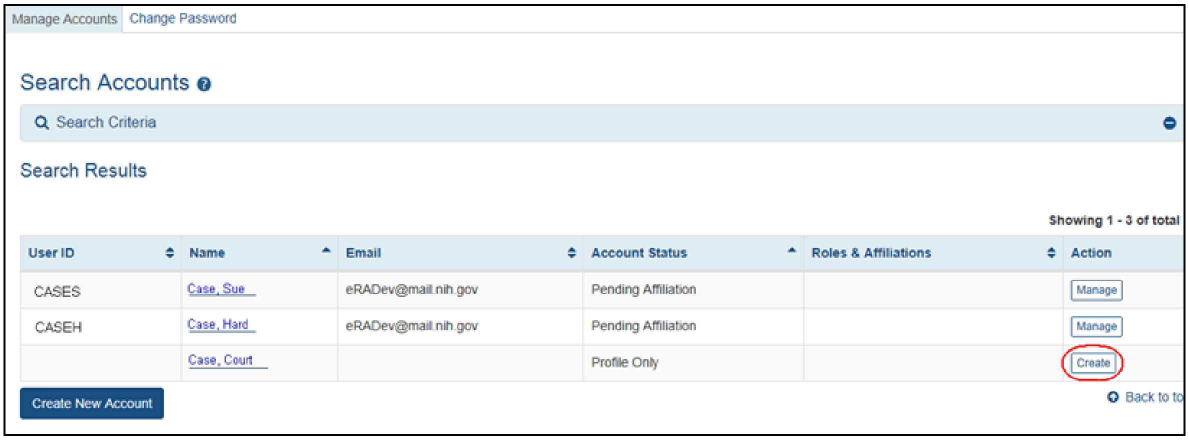


Figure 3: Search Account screen displaying Create button

- Refer to the [Create State Department User Accounts]() topic for more information.

- **Manage Account**
    - The Manage button appears if the account status is Active or Pending Affiliation.

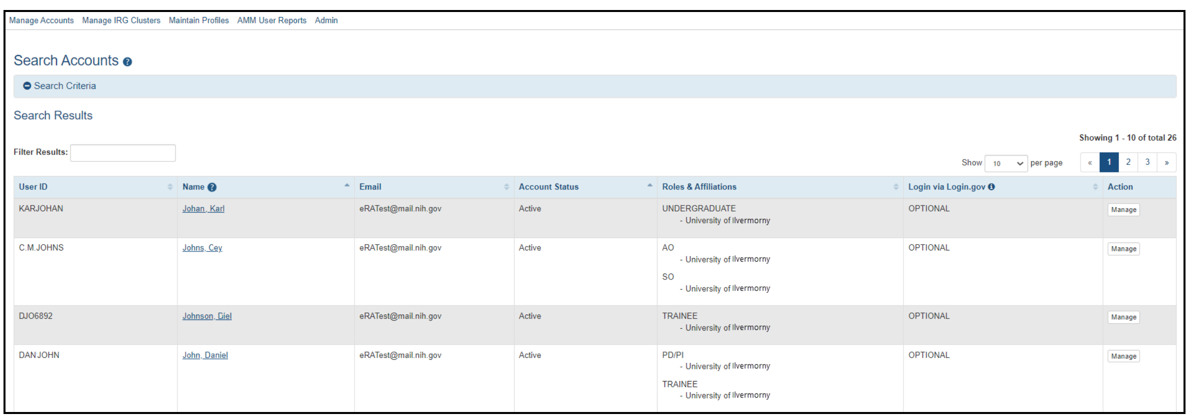


Figure 4: Search Accounts screen with Manage button

- To edit an account, click the appropriate **Manage** button and the *Manage Account* screen opens.

- See Manage State Department User Accounts for more information.

Create State Department User Accounts

1. To create an account perform a search first.
    a. for instructions see Search Account for State Department Users.

When the **Create New Account** button is clicked on the *Search Accounts* screen, the *Create Account* screen opens.

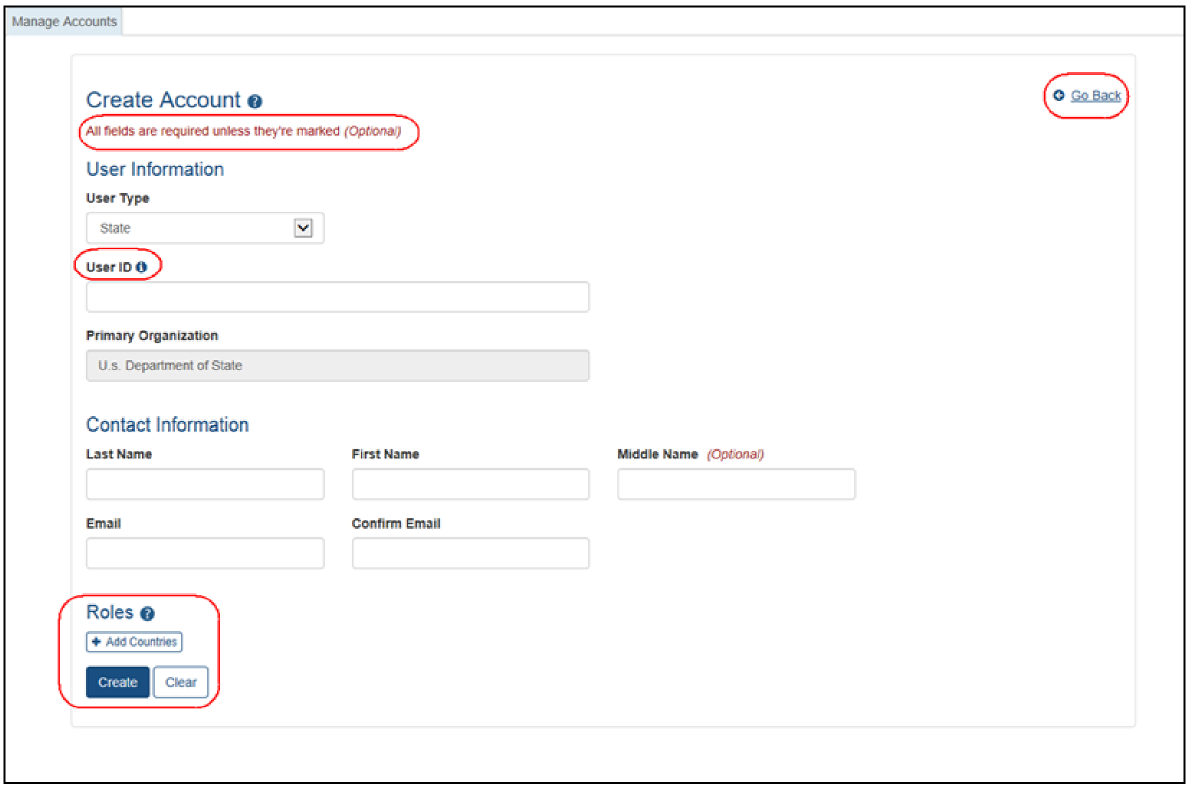


Figure 5: Create Account Screen for State Department Users

Perform the following steps:

2. The **User Type** is State.
3. Enter the **User ID** or let the system generate one.
    a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.

b. The system can display the following messages: This User ID is available OR This User ID is already taken, please use another one.

4. To add countries, click the **+ Add Countries** button.
   a. Please refer to the Add Countries topic for more information.
5. Perform one of the following options:
   a. When the account information is complete, click the **Create** button.
   b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the *Account Details* screen: Account created successfully.

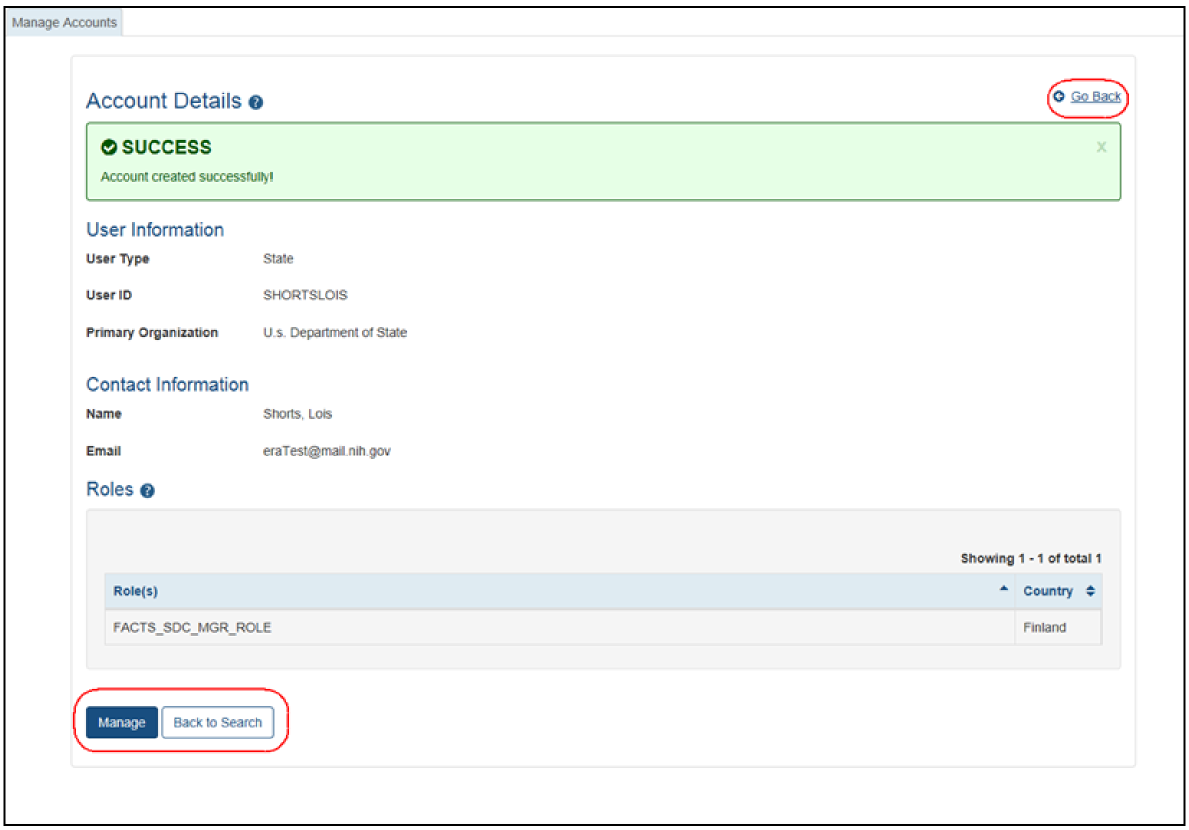


Figure 6: Account Details Screen for State Department Users

6. Perform one of the following options on the *Account Details* screen:
   a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.

b. To edit the account's information, click the **Manage** button.
    i. For more information, please refer to the Manage State Department User Accounts topic.
c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

Set Primary Organization

NOTE: The **magnifying glass** for the **Primary Organization** field on the *Create Account* screen appears if the logged in user is not affiliated with an Organization, IC, or Agency. Usually the **Primary Organization** defaults to the logged in user's Organization.

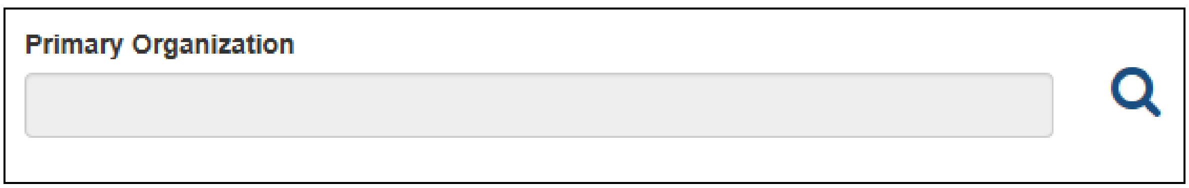


Figure 7: Primary Organization Field

1. To add a primary organization click the **magnifying glass** icon on the *Create Account* screen.

When the **magnifying glass** icon is clicked, the *Search Organization and Add Roles* screen opens.

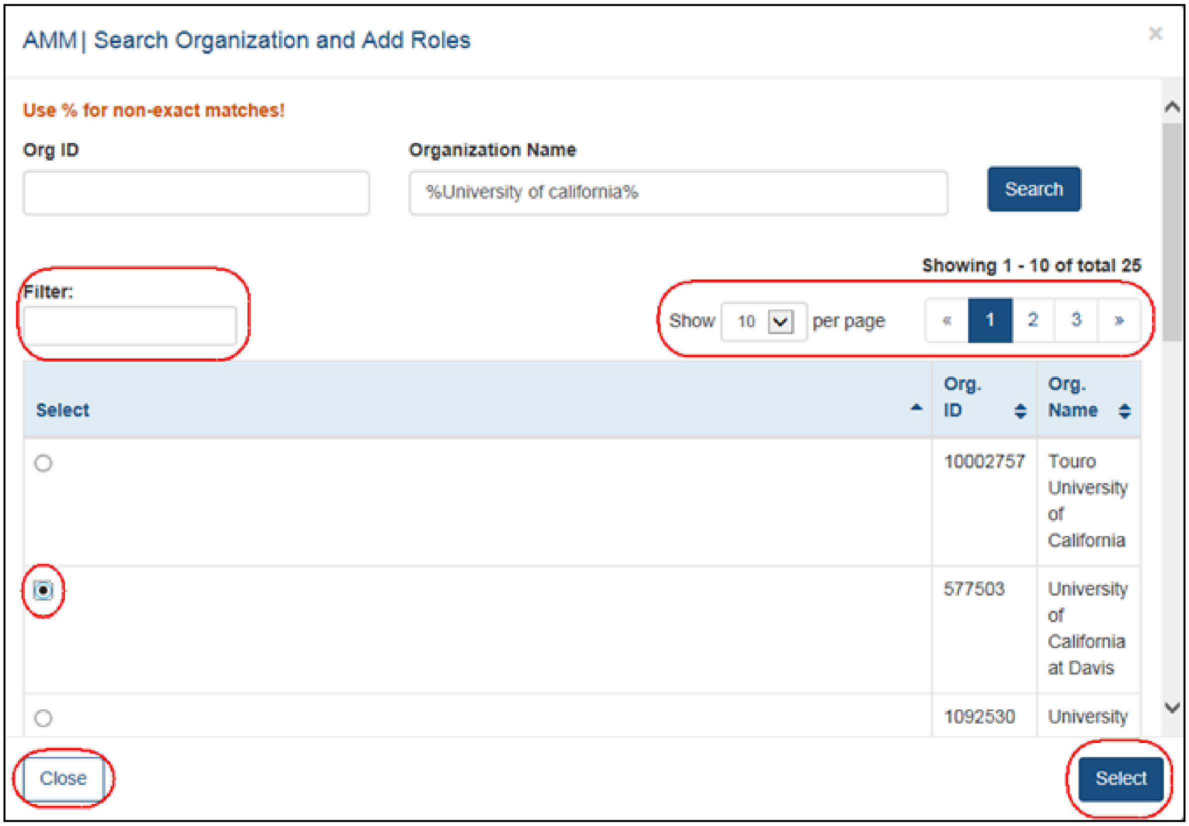


Figure 8: Search Organization and Add Roles Screen

2. Enter an **Org ID** or an **Organization Name**.

NOTE: Wild card characters such as the percent sign (%) can be used to search for a string of characters.

3. Click the first **Search** button.

When the first **Search** button is clicked, the organization is displayed, if present.

4. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key. For example, enter *San Diego* to view only those universities in California.
5. To change the number of records per page, select the appropriate number in the **Show per page** column.

6. To navigate between pages, perform one of the following options:
    a. Click the appropriate **Page Number** button.
    b. Click the **right double arrows** button to go to the end of the list.
    c. Click the **left double arrows** button to go to the beginning of the list.
7. Select the appropriate organization's radio button.
8. Click the second **Select** button or click the **Close** button to close the screen.

When the second **Select** button is clicked, the *Create Account* screen displays the selected primary organization. For more information see.

Manage Accounts

User Accounts

Once an account is created it can be maintained via the *Manage Accounts* screen.

- Manage State Department User Accounts

Manage State Department User Accounts

1. Perform one of the following steps to edit an account:
   a. Click the appropriate **Manage** button in the **Action** column on the *Search Accounts* or *Annual Recertification* screens.
   b. Click the **Manage** button on the *Account Details* screen after an account have been created or saved (edited).

Clicking the **Manage** button opens the

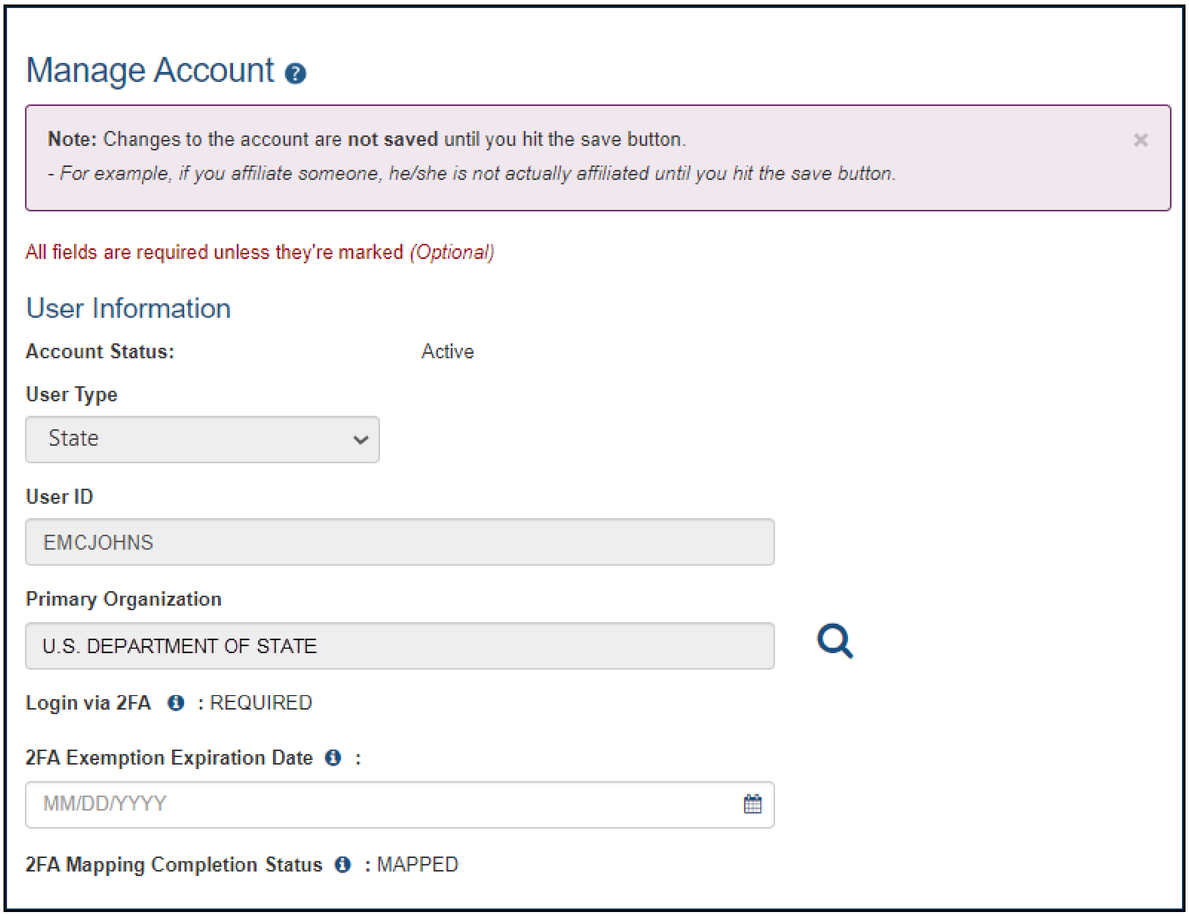


Figure 9: Manage Account Screen for State Department Users

NOTE: Fields that are grayed out are not editable.

Perform one or more of the following steps:

1. Edit the **Email** addresses, if necessary.
2. Click the **+ Add Countries** button to add countries.
    a. For more information, please refer to the Add/Delete Countries topic.
3. Click the **Remove** button to remove a country from the list in the *Roles* section.
4. Click the **Reset Password** button to reset the user's password.
    a. Please refer the Reset Password topic for more information.
5. Perform one of the following options:
    a. Click the **Save** button to save the changes.
    b. Click the **Cancel** button to return to the *Account Details* screen.

Clicking the **Save** button opens the Account Details screen with the message: *Account was updated successfully!*

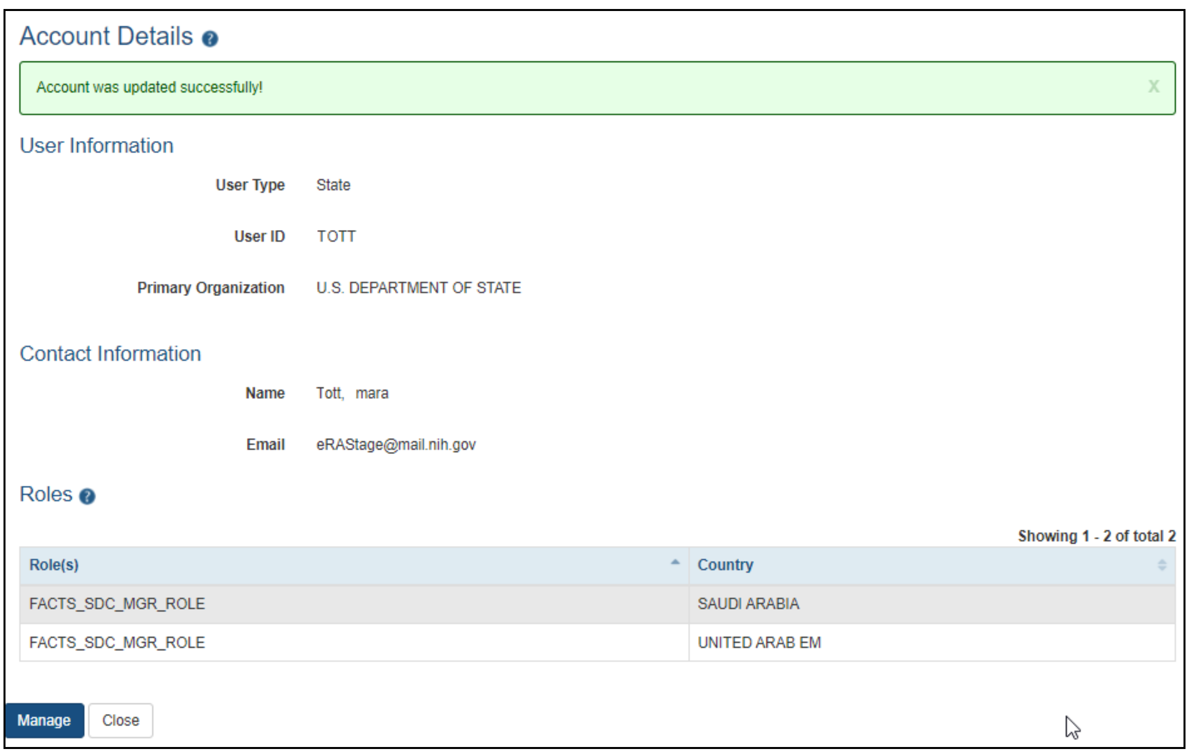


Figure 10: State Dept Account Details screen

6. Perform one of the following options on the *Account Details* screen:
   a. To edit the account's information, click the **Manage** button.
7. Two-Factor Authentication:

- **Login via 2FA** — Shows the status of login.gov for this account: "Required," "Optional" or "Exemption."
  Note: This field is set automatically at the organization level.
- **2FA Exemption Expiration Date** — When *Login via 2FA* is set to "Exemption," this field displays the end date for the exemption. The user can log in using eRA credentials until this date.
  Note: Two-factor authentication exemptions are only granted on a limited basis by the eRA Service Desk and only the eRA Service Desk can modify this date.
- **2FA Mapping Completion Status** — Indicates whether the user's account is Mapped or Not Mapped for two-factor authentication.

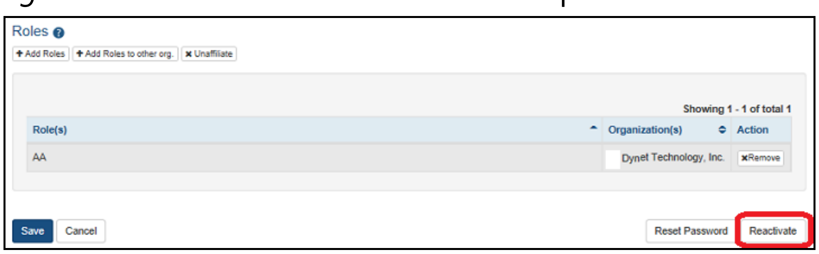
Reactivate Account

Reactivate Account

Use these steps to reactivate an account that has been deactivated by an administrator or that has been locked due to inactivity.

1. Open the account in the *Manage Account* screen.

2. If an account is deactivated, a **Reactivate** button displays at the bottom of the *Manage Account* screen. Click this button to proceed.



3. When you click **Reactivate**, the *Reactivate Account* screen opens.

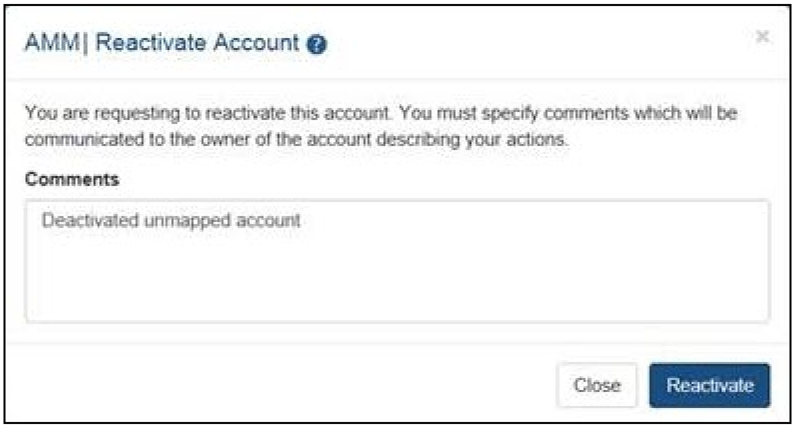


Figure 11: Reactivate Account screen

Figure 12: Unlock Account screen

4. Enter comments in the comments field to inform the user about this action (required). Click **Reactivate** to reactivate the account, or click Close to cancel.

a. Enter comments in the comments field to inform the user about this action (required).

b. Click **Reactivate** to reactivate the account, or click **Close** to cancel.

5. When you click **Reactivate**, the system reactivates the account and displays a confirmation message.
6. The account owner receives an email notification that includes the text you enter in the **Comments** field.

NOTE: The unlock notification asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

Add/Delete Countries

Agency-Specific Instructions: This functionality is for State Department users only.

1. To add a country to the account, click on the **+ Add Countries** button on the *Create Accounts* screen.

Figure 13: Add Countries Button

Clicking the **+ Add Countries** button displays the pop-up *Add Countries* screen.

Figure 14: Add Countries Screen

2. To find a country, click in the list of countries and type the first letter of the country's name.
   a. For example, to find the United Kingdom hit the **<U>** key on the keyboard.
3. Highlight the appropriate country name.

When a country name is highlighted, the **Add Countries** button is enabled.

4. Perform one of the following options:
   a. Click the **Close** button to close the screen.
   b. Click the **Add Countries** button to add the selected country.

Clicking the **Add Countries** button adds the selected country to the *Roles* section on the *Create Account* or *Manage Account* screen.

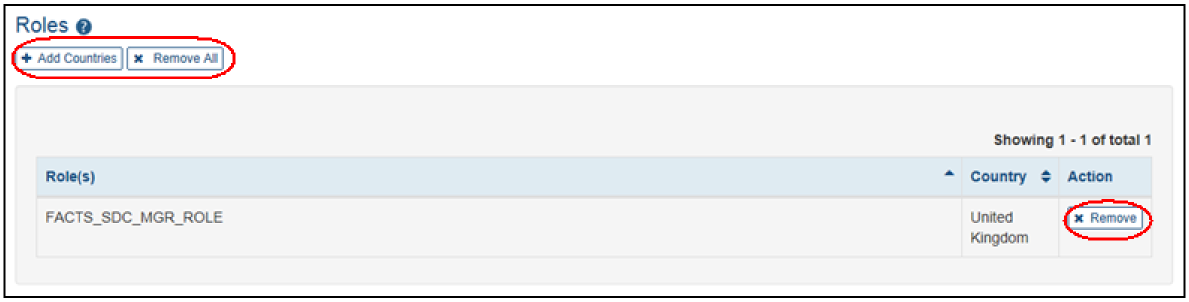


Figure 15: Roles/Add Countries Section on the Create Account Screen

5. To add another country, click the **+ Add Countries** button. Repeat the steps above.
6. To remove a country, click the **X Remove** button.
7. To remove all countries, click the **X Remove All** button.

Add System Roles

NOTE: The list of roles is dependent on the logged-in user's role.

1. To add system roles to the account, click on the **+ Add Roles** button on the *Create Accounts* screen.

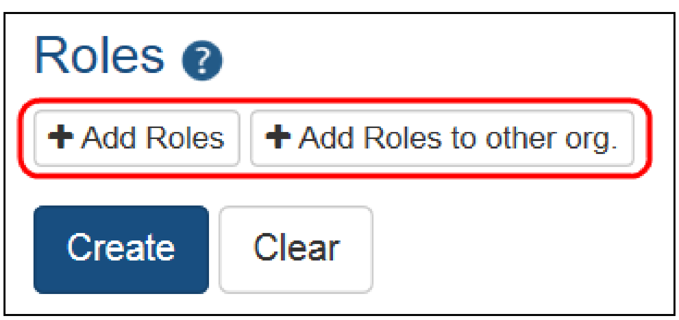


Figure 16: Add Roles Button on the Create Account Screen

When the **+ Add Roles** button is clicked, the pop-up *Add Roles* screen displays.

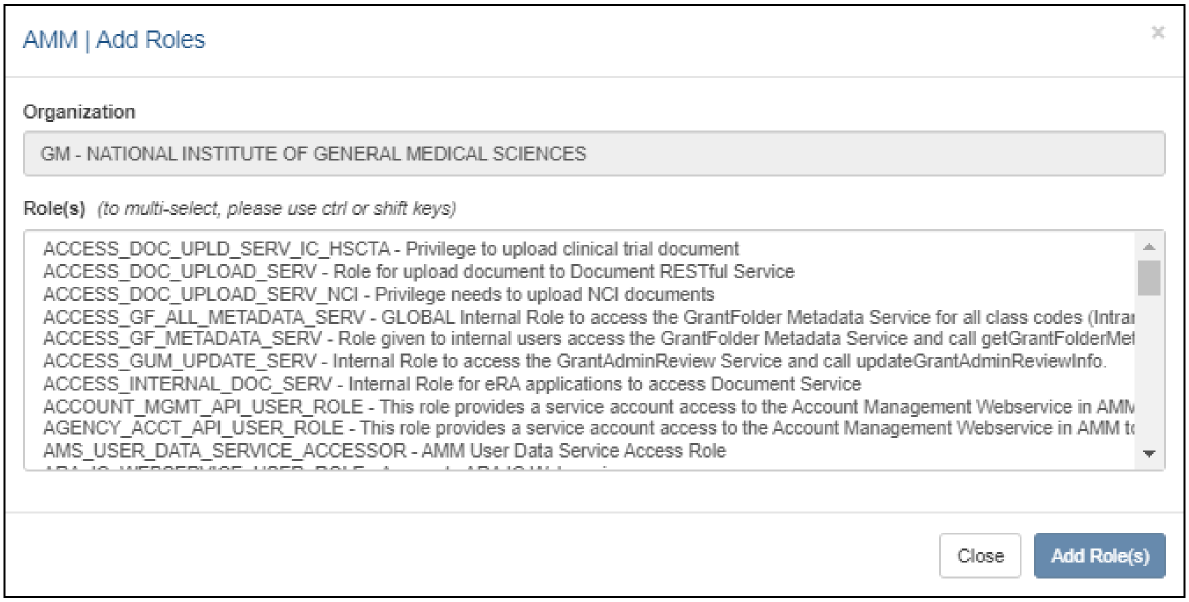


Figure 17: Add Roles Screen Displaying Agency System Roles List

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

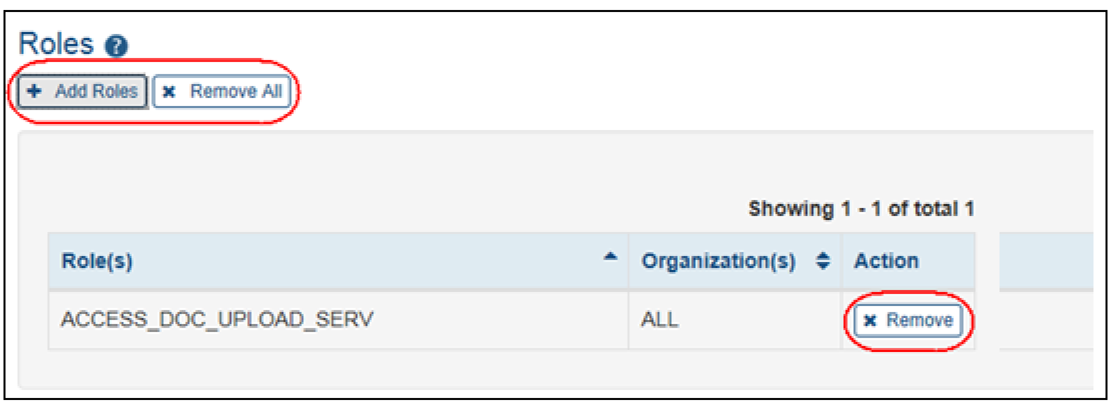


Figure 18: Roles Section on the Create Accounts Screen for Agency Users

3. To add additional roles, click the **+ Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

Add Roles to Other Org

NOTE: This function is available only for eRA Service Desk agents to give an account roles in another organization.

Click the **+ Add Roles to other org.** button and a pop-up search window opens so you can search for and select the other organization:

Select the other organization in this window and click **Next** to proceed to the *Add Roles* screen, as described above.

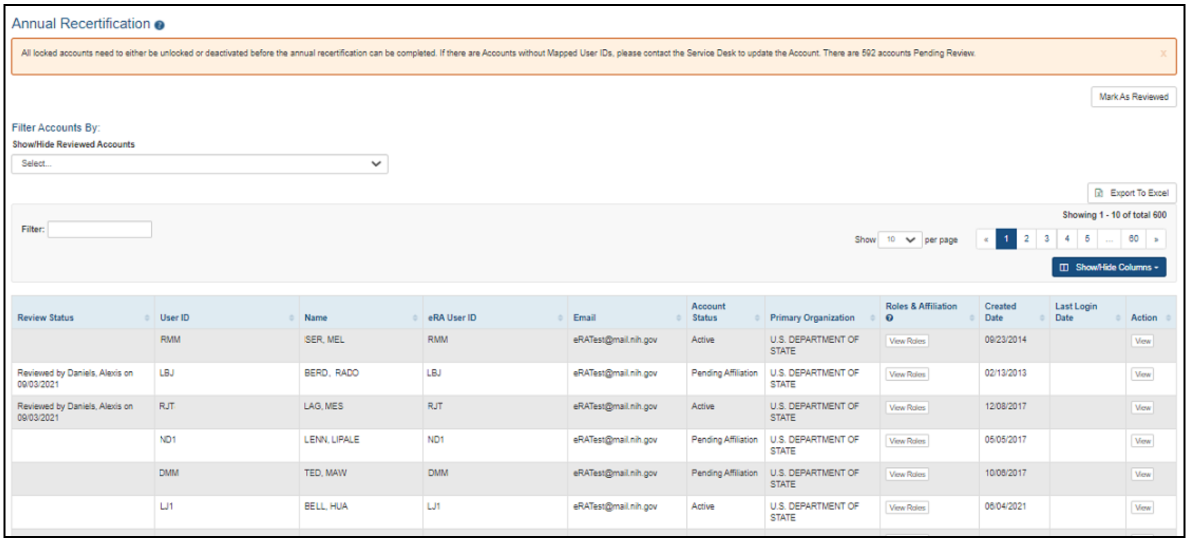
Annual Recertification for IMPACII User Accounts

The screen below opens when you click the **Annual Recertification** link in the AMM [Admin Tools] tab.

eRA Service Desk agents, Account Admins and IC Account Coordinators use this screen to review all the all non-deactivated user accounts in their ICs, including application and DB accounts. After reviewing the accounts, IC Coordinators make all necessary updates and changes and then Recertify them.

This screen shows accounts at the IC that were created on or before the Recertification Period Start Date and are not deactivated. (status 1, 3, 4 & 5).
But AMM will show you only the accounts that you are responsible for based on the type of Admin you are.

A banner at the top of the screen shows the number of accounts that are pending review:



Actions

Use the tools in this screen to Review and Recertify accounts:

Show account data

- **Select IC** — If you are responsible for more than one IC, use the **IC** drop-down menu to select the one you want to work with.
- **Filter** — You can use the filters at the top of the screen to filter the accounts by Org/Department, Additional Information, NED Federal Supervisor, Account Status, NED Org Path, and Show/Hide Reviewed Accounts.
- **Show/Hide Columns** — Click to select the columns to show in the table.
- **View Roles** — In addition to the on-screen information, you can click View Roles to open a View Roles pop-up window and review the account's user roles.

Review and Update Accounts

- Review information for all accounts.
- If necessary click the **Manage** action for an account to make updates and changes in the Manage Account screen, which will open in a new tab.

NOTE: All locked accounts need to either be unlocked or deactivated before the annual recertification can be completed. If there are Accounts without Mapped User IDs, please contact the Service Desk to update the Account. There are ## accounts Pending Review.

- **Check when Reviewed** — Click these checkboxes on the left when you finish reviewing accounts.
- **Mark As Reviewed** — Or click this button to mark all displayed accounts as reviewed (accounts that are hidden by the filters will not be marked as reviewed).

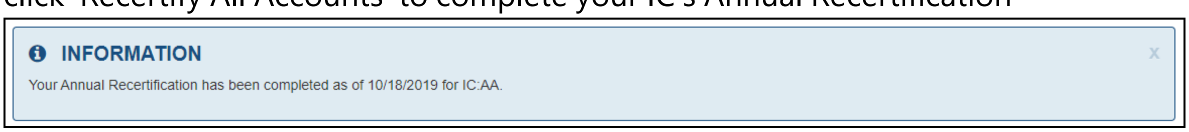
NOTE: as an Account Coordinator, you cannot mark your own account as reviewed. Another Account Admin will have to Review and make any changes to your account and mark it as reviewed.

- The *Reviewed by* name and date in the *Review Status* column will be updated if the account is updated via the Manage Account screen after the *Check when Reviewed* box is checked.
- If account info is updated in NED after an account is reviewed, Account Coordinators have to re-review the account and check the Reviewed Checkbox.
- When all accounts in the IC have been reviewed, a banner at the top of the screen will notify you.

Recertify Accounts

NOTE: When all accounts have been reviewed, a banner at the top of the screen will announce:
"Your IC has marked all accounts as reviewed. Please be advised that you still must click 'Recertify All Accounts' to complete your IC's Annual Recertification"

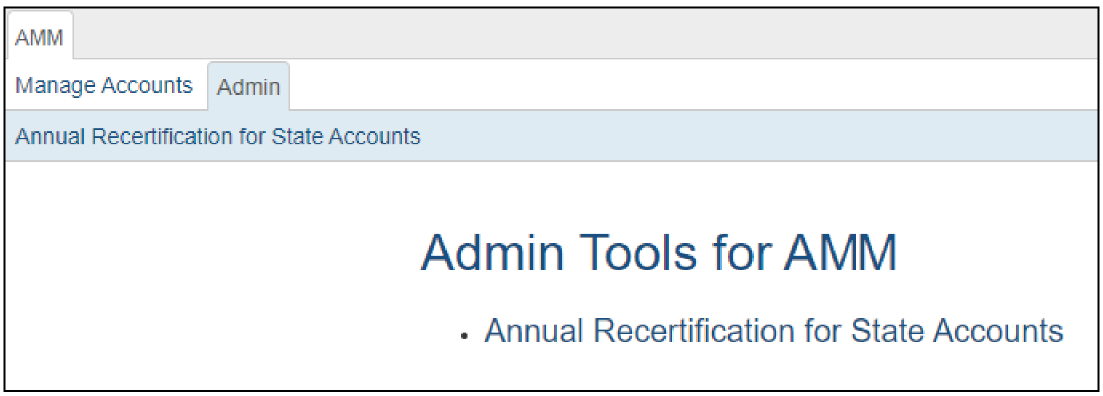
- **Recertify All Accounts** — When you receive notice that all accounts have been reviewed, click this button to recertify all accounts.
Note: Your IC has marked all accounts as reviewed. Please be advised that you still must click 'Recertify All Accounts' to complete your IC's Annual Recertification"



- After you successfully recertify accounts, AMM sends you a confirmation email that includes a link you can click to see a list of the accounts you recertified.
- AMM will deactivate accounts that are locked due to 120 days of inactivity and not recertified or logged in within 30 days after the annual recertification.

Admin Tools

Account Coordinators click the **Admin** tab to access the following account administration tools:



- Annual Recertification for State Accounts
  Review and Recertify State Dept user application and database accounts

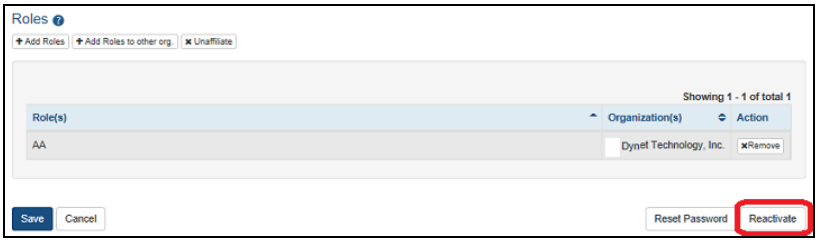
Reactivate Account

Reactivate Account

Use these steps to reactivate an account that has been deactivated by an administrator or that has been locked due to inactivity.

1. Open the account in the *Manage Account* screen.

2. If an account is deactivated, a **Reactivate** button displays at the bottom of the *Manage Account* screen. Click this button to proceed.



3. When you click **Reactivate**, the *Reactivate Account* screen opens.

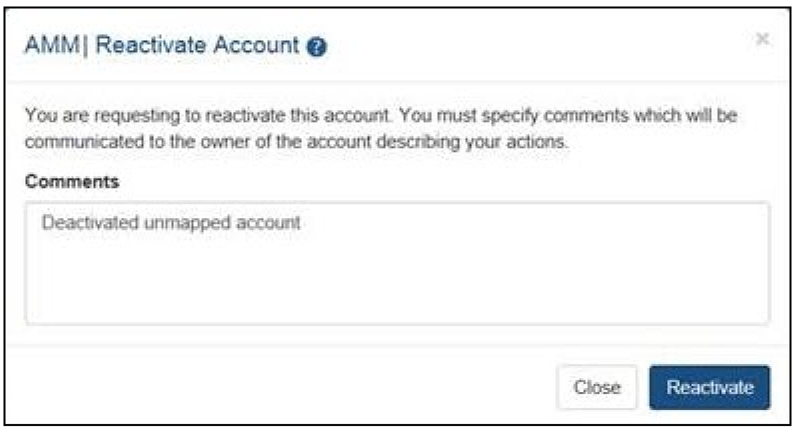


Figure 19: Reactivate Account screen

Figure 20: Unlock Account screen

4. Enter comments in the comments field to inform the user about this action (required). Click **Reactivate** to reactivate the account, or click Close to cancel.

a. Enter comments in the comments field to inform the user about this action (required).

b. Click **Reactivate** to reactivate the account, or click **Close** to cancel.

5. When you click **Reactivate**, the system reactivates the account and displays a confirmation message.
6. The account owner receives an email notification that includes the text you enter in the **Comments** field.

NOTE: The unlock notification asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

User Reports

AMM includes the following reports capabilities:

- **All Users Report** — Information on all user accounts in your organization.
- **Inactive Users Report** — Lists user accounts that have been locked due to inactivity (**note**: for internal users only)
- **Deactivated Users Report** — Lists user accounts that have been deactivated by an administrator. **Note**: For internal users only.
- **Role Description Report** — Lists all roles, role descriptions, and associated privileges for any business area. **Note**: for internal users only.

To open the reporting functions, click the **AMM User Reports** tab.

The *All Users Report* screen opens. There are two versions of this screen, as shown below. The version you see depends on the organization you belong to.

TIP: To select multiple organizations, roles, or business areas, hold the <Ctrl> key as you click.

All Users Report Screen for External Users

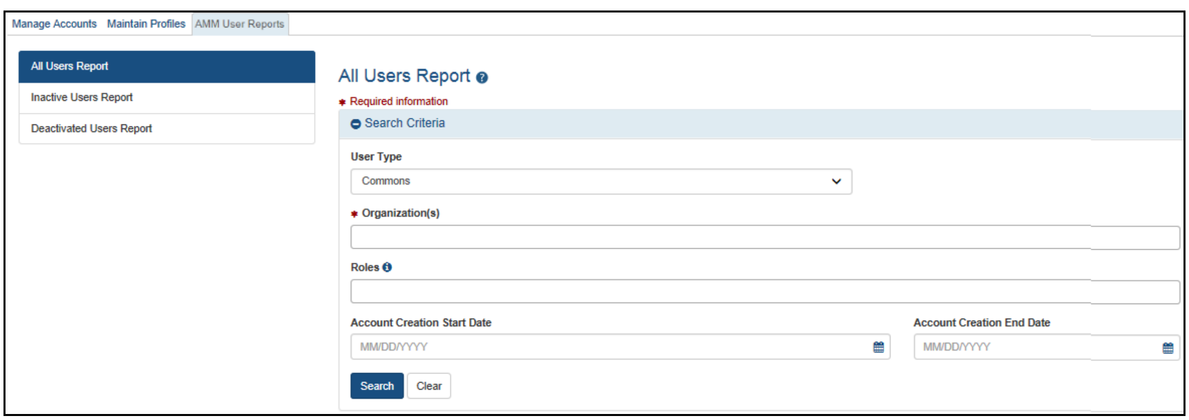


Figure 21: All Users Report Screen for External Users

Use this screen to run an All Users Report on external users. The **All Users Report** button is selected by default. Follow the steps below to launch the report.

1. Select "Commons" in the **User Type** field and set the search criteria in the other fields as follows:

2. **Organization** — This field displays your organization name. Service Desk agents, to select an organization, begin typing its name or ID number in this field. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it.

NOTE: This field is mandatory.

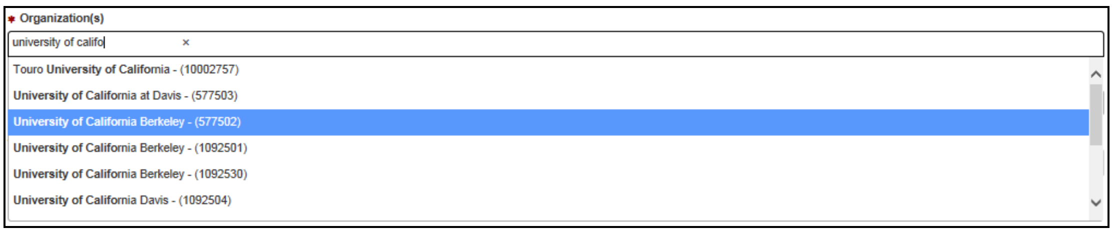


Figure 22: Organization field, external

3. **Roles** — Leave this field blank to report all user roles. To limit the report to one or more user roles, click this field to open the drop-down menu or begin typing the name of a role. The live search function displays roles as you type. When the one you want appears, scroll down and click to select it, as shown below.

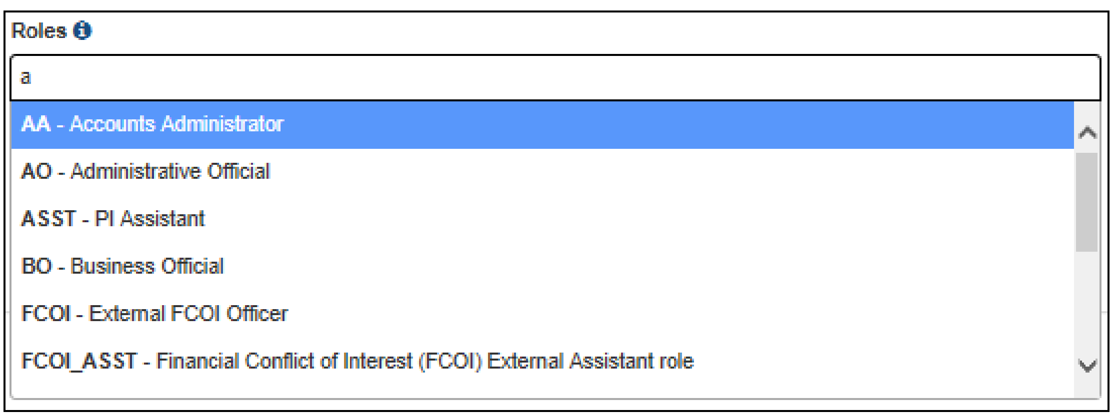


Figure 23: Roles drop-down menu

4. **Account Creation Start Date/End Date** — Leave these fields blank to report all time periods. To limit the report to a certain time period, enter a start date, end date, or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.
5. When you finish entering search criteria, click **Search** to run the report. See Report Output below.

Figure 24: All Users Report Screen for Internal Users

Figure 25: All Users Report button

Figure 26: Organization field, internal

Figure 27: Business Area field

Figure 28: Roles field

Figure 29: Inactive Users Report button

Role Description Report

Figure 30: Role Description Report button

Report Output

All Users Report Output

Click the **All Users report** button and enter search criteria as described above to run the report. When you click the **Search** button for the All Users report, the report output displays.

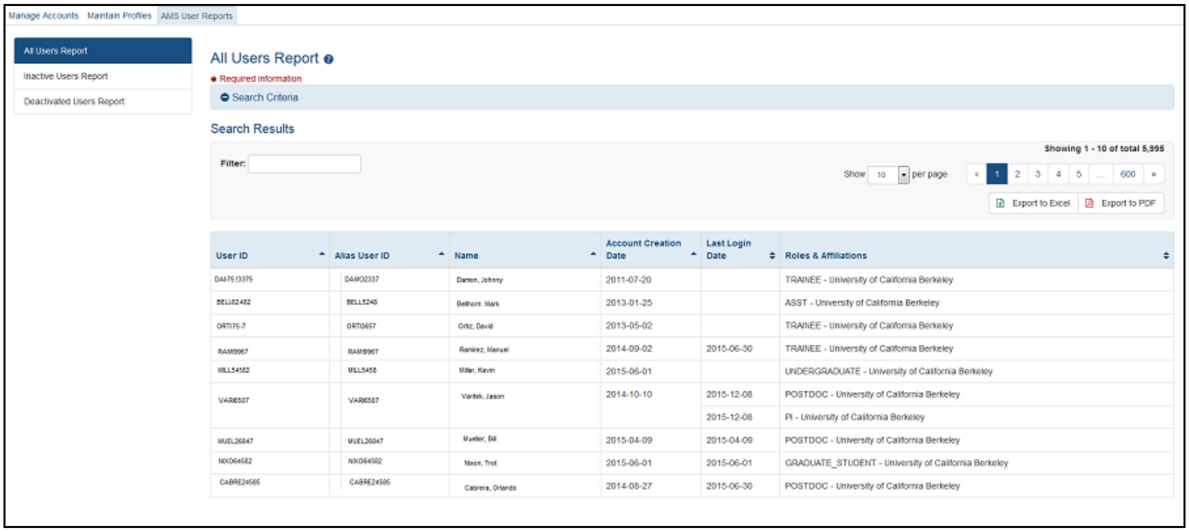


Figure 31: All Users Report output

Figure 32: All Users Report output for internal users

Figure 33: Inactive Users Report output

Figure 34: Deactivated Users Report output

Role Description Report Output

Figure 35: Role Description Report output

Navigating the Report Output

These tips for browsing, filtering and exporting the report output apply to all report types.

The report output displays include several control options:.

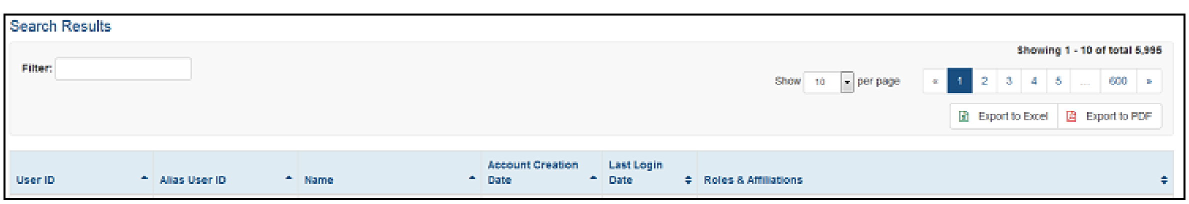


Figure 36: Report output controls

- To filter the report, type some text in the **Filter** field, such as a name. Only rows that contain the filter term will be displayed, and all instances of the filter text will be highlighted in yellow:

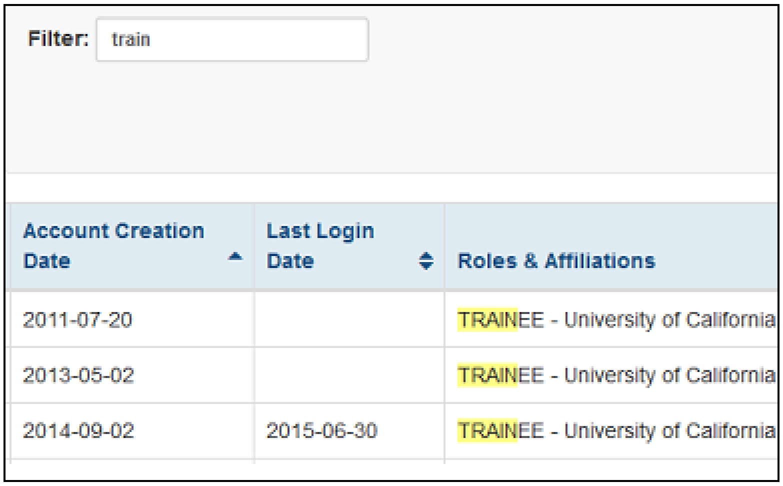


Figure 37: Filter results

- To adjust the number of records displayed, select a number in the **Show per page** drop-down menu.
- To navigate the report pages, click a **Page Number** or use the left and right arrow buttons.
- To re-sort the report columns in ascending or descending order, click the up/down arrows in the column headers.
- To export the report output as an Excel spreadsheet or PDF, click the appropriate **Export** button:

Figure 38: Export button

- **Export to Excel** — When you click this button, an open-or-save dialog opens.
  - Click **Open** to open the report data in Excel. A new Excel window opens Go to it and click the **Enable Editing** button in the yellow bar at the top of the worksheet, then work with the spreadsheet as usual.

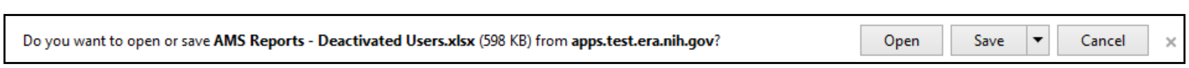


Figure 39: Open-or-save dialog

- **Export to PDF** — Click this button to save the report as a PDF file. A save dialog opens. Choose a location and save the file.